

March 2023

孕期营养 - China

“孕产期营养品牌应更加关注计划再要一个孩子的女性的健康需求，以及重视女性在孕前、孕期和产后具体时间段可能出现的不同病症。品牌或可重点考虑两方面——鉴于对疫情的担忧为一些希望怀孕的女性消费者提供缓解压力方面的支持；以及宣传‘分阶段’的营养品组合。”

— 刘文诗，高级研究分析师

January 2023

奶酪 - China

“奶酪市场的增速因消费者对经济前景持保守态度而有所放缓，市场产品也摒弃折扣价格战，导致总销量受挫。未来，市场增长将受益于促进奶酪消费的政策，以及消费者对家庭餐桌场景中出现更多含有奶酪的菜肴的更高认知和接受程度。该市场的机遇在于利用创新形态、替代性零食场景和更多关于奶酪整体天然营养价值（富含钙和维生素）的市场教育活动来吸引消费者。”

— 彭袁君，高级研究分析师

烹饪和烘焙习惯 - China

“健康饮食不断驱动人们采用更健康的烹饪方式，并持续关注清淡饮食和天然性，这意味着空气炸锅等升级厨电和代糖等更健康的调味料将迎来机遇。品牌也应提供适合年轻消费者的烹饪解决方案，帮助其参与烹饪，并在面对不确定性时能展现更强的韧性。”

— 黄梦菲，研究分析师

December 2022

Cheese - China

“The cheese market has shown a slowed growth rate due to consumers’ conservative financial outlook with market offerings moving away from the price war of discounts that discouraged the total sales volume. In the future, the growth will benefit from policies supporting cheese consumption and better awareness and acceptance of ...

酱料、调味料和涂抹酱 - China

Nutrition for Pregnancy - China

“Maternal nutrition companies must focus more on the health demands of women with plans to have more children, as well as address different ailments that may occur at specific times during preconception, pregnancy, and postnatal. Offering support on stress relief for women who wish to conceive in light of fears ...

食用油 - China

“由于消费者越来越在意日常油脂摄入量，食用油品牌或将面临销量停滞的局面。为了维持增长，品牌可以利用MLCT油等低脂食用油，或通过扩大目标群体和利用有效的推广渠道，继续挖掘小众油——尤其是核桃油的市场。”

Cooking and Baking Habits - China

“2022年，由于疫情不时反弹，消费者居家烹饪频率和囤货需求增加，酱料、调味料和涂抹酱市场经历了缓慢但又不失韧性的增长。随着“低/无/减”宣称成为主流，酱油有机会通过营养强化进一步迈向高端化。在复合调味料市场，品牌可凭借新奇风味脱颖而出，并利用“专业”和“正宗”宣称吸引高端消费者。此外，品牌还需在用户友好和可持续环保包装方面加大创新投入。”

– 顾一凡，研究副总监

Cooking Oils - China

“Cooking oil brands would face stagnant consumption due to consumers’ growing awareness of daily fat intake. To sustain growth, brands can capitalise on low-fat cooking oils such as MLCT oils, or keep tapping into niche oil – especially walnut oil – by expanding their target audience and leveraging effective promotional ...

“Healthy eating continues to drive usage of healthier cooking methods and sustained attention to light diet and naturalness, indicating the opportunity for both upgraded cooking appliances such as air fryers and healthier condiments such as sugar substitute. Brands should also help young consumers with adaptive cooking to keep them engaged ...

November 2022

婴幼儿配方奶 - China

“与日俱增的民族自豪感、新冠疫情影响和婴幼儿配方奶新国标可能会让人们更加偏爱爱国产品牌推出的高端产品，因此国际品牌需要加大力度满足中国婴幼儿的营养需求，并与妈妈们培养情感共鸣和建立密切的关系。”

– 刘文诗，高级研究分析师

Sauces, Seasonings and Spreads - China

“The sauces, seasonings and spreads market has experienced slow but resilient growth in 2022 with the rise of in-home cooking and stockpiling amid the resurgence of COVID-19. As minus claims are becoming mainstream, soy sauces can further premiumise via nutrition fortification. For compound seasonings, brands could differentiate with novel flavours ...

Infant Milk Formula - China

“Rising China pride, the impact of COVID-19 and the new China IMF standards are likely to further improve preference for premium products launched by domestic brands, so international players need to step up their game to meet Chinese babies’ nutritional needs and develop resonance and rapport with moms.”

– ...

October 2022

Baby Supplementary Foods - China

“The baby supplementary food market is risking decline in value of sales mainly due to the continued decrease in

糖果 - China

“糖果市场面临激烈内部竞争的同时，也面临着来自保健品的的外部威胁。我们建议糖果品牌，尤其是专注功能性糖果的品牌利用糖果的减压功能，并通过强调维生素和矿物

number of new births resulting into lower consumer base. Buoyed by COVID-19, products that have a strong health positioning are attracting greater interests in the market. Baby supplementary food brands will ...

质含量而不是中草药成分来宣传产品的天然性。”

——殷如君，高级研究分析师

September 2022

Sugar Confectionery - China

"The sugar confectionery market faces intensified internal competition as well as external threats from health supplements. Brands – especially those focused on functional candy – are recommended to capitalise on the stress relief function and promote naturalness through vitamin and mineral content rather than TCM ingredients."

宠物食品 - China

"天然性是主要复购因素之一，但有着具体化的定义。宠物主人不仅寻求全天然的食材，也要求食品是动物饮食天性的一部分。再加上体重管理食品，这些是最迫切的需要市场响应的需求。"

Pet Food - China

"Naturalness is one of the leading repurchasing factors but with a specific definition. Pet owners ask not only for all-natural ingredients but also that the food should be part of the animal's natural diet. Together with food for weight management, these are the most urgent needs for the market to ...

August 2022

预加工食品 - China

"中国最新一轮、最大规模的新冠疫情病例反弹加速推动预加工食品的零售额增长，并进一步促进渗透率较低的品类（即即烹食品和即配食品）的消费。为了在后疫情时期保持增长势头，品牌可针对传统预加工食品进行革新，通过升级营养融入消费者的健康管理和体重管理日常。与此同时，品牌可聚焦适用于厨房小家电的定制化产品，为消费者提供更多便利。"

Ready Meals - China

"The latest and largest resurgence of cases in China has accelerated the retail sales of ready meals and boosted the consumption of its less penetrated categories (ie ready-to-cook and ready-to-prepared foods). To keep the growth momentum in the post-COVID-19 period, brands can renovate traditional ready meal products to tap into ...

酸奶 - China

"常温酸奶的消费频率呈下降趋势，且消费升级意愿不高。尽管冷藏酸奶市场销售额大幅缩水，但其整体消费频率呈上升趋势。无糖产品创新、专利菌种以及颗粒带来的更好的纵享体验，都将有助于酸奶市场重获增长势头。"

July 2022

冰淇淋 - China

Yogurt - China

“最近，由于中国新冠疫情复发，人们的居家时间变长，这可能有利于包装冰淇淋的居家消费，因为冰淇淋具有慰藉作用。品牌可以更进一步，通过以地域美食为灵感的冰淇淋配方，令消费者仿佛置身他们钟爱的地方。同时，冰淇淋品牌挖掘健康化趋势的时机已到，目前该趋势已经在其他食品和饮料品类显现，品牌可以利用更加健康天然的成分对产品进行升级。”

— 鲁睿勋，高级研究分析师

代餐 - China

“由于代餐产品的目标受众主要是女性，代餐品牌需要提供针对不同年龄段女性的解决方案以维持增长。此外，代餐和零食类食品日益融合；在不妥协口味的基础上，品牌需要宣传“添加”类营养，同时弱化“减少”类宣称，从而满足提升免疫力和肠道健康管理等消费者最希望获得的健康功效。”

— 殷如君，高级研究分析师

June 2022

Ice Cream - China

"Growing time spent at home as a result of the recent resurgence of COVID-19 in China may benefit in-home consumption of packaged ice cream due to its comforting role. Brands can step further by transporting consumers to their favourite destinations with ice cream recipes inspired from regional cuisines. Meanwhile, it's ...

Plant-based Food - China

"Consumers' growing preference for localised plant-based meat product indicates that it's time for plant-based meat to move beyond novel ingredient representing Western dietary culture and to be integrated into local food culture. A look into the senior consumer group places opportunity for plant-based foods to intrigue their needs in healthier ...

Instant Foods - China

"The instant food market experienced a decline in the past year due to the significantly-reduced in-home consumption compared to the pandemic period. Faced with competition from ready meals and delivery foods, instant food brands would need to further enhance 'plus' attributes in the products and leverage occasion-based marketing to sustain ...

"Ambient yogurt is facing declining consumption frequency and low willingness to trade-up. Chilled yogurt, despite its large decline in market value, saw increases in overall consumption frequency. Innovations focused on sugar-free products, patented strains, and improved indulgence brought by mix-ins will help win back the market momentum."

Meal Replacements - China

"With the target audience mainly being females, meal replacement brands need to provide age-specific solutions among females to sustain growth. In addition, the line between meal replacements and snack foods is increasingly blurred. Without compromising the taste, brands need to promote 'plus' nutrients while downplaying 'minus' claims to satisfy consumers' ...

植物基饮食 - China

“消费者越来越喜爱本土化的植物肉制品，表明植物肉是时候超越代表西方饮食文化的新颖食材，融入本土饮食文化。此外，对老年消费群体的探究为植物基食品带来机遇，以激发该群体对更健康的植物蛋白补充剂的需求。”

— 黄梦菲，研究分析师

方便食品 - China

由于居家食品消费量较疫情前大幅减少，方便食品市场在过去一年出现下滑。面对来自预加工食品和外卖食品的竞争，方便食品品牌需要进一步强化产品中的‘添加’属性，并利用场景化营销来保持未来的增长。”

— 殷如君，高级研究分析师

May 2022

中老年食品饮料消费趋势 - China

“对于中老年人来说，健康是重中之重，但享受同样重要。短期内，营养成分表和健康宣称仍是关键的考虑因素。长期来看，中老年人希望获得在营养与口味上平衡的、专门的纵享型食品饮料。与机能失调和便于使用相关的宣称也是未来的发展方向。”

牛奶和乳饮料 - China

“整体来看，液体白奶在今年的表现最为出色。虽然如此，常温纯牛奶需谨慎定价，并更关注产品口味，而冷藏纯牛奶可从更多维度传达新鲜度。原味奶粉正乘搭不断增长的银发经济浪潮，功能性宣称将成为该市场的破局关键点。由于益生菌保健品来势汹汹，乳酸菌饮料需思考如何通过不同的方式阐述产品对肠道的益处。”

— 彭袁君，研究分析师

April 2022

包装烘焙食品 - China

“未来几年，包装烘焙食品品类预计将保持稳健增长。由于消费者不断追求更健康的生活方式，定位精准且面向不同细分人群的包装烘焙食品具有增长潜力。随着银发经济崛起，年长一代特别值得关注。此外，传统糕点不断引领潮流。企业可围绕社会责任建立品牌，以更好地与消费者的价值观产生共鸣，并赢得他们的青睐。”

— 张辰钰，高级研究分析师

Milk and Dairy Beverages - China

"White liquid as a whole had the best performance this year. But ambient plain milk needs to be conscious about pricing and pay more attention to taste, while chilled plain milk can leverage more dimensions to deliver the concept of freshness. White powder is leveraging the growing silver economy and ...

Senior Food and Drink Solutions - China

"Health is in the lime light but indulgence still matters to seniors. In short term, nutrition label and health claims are still key consideration. In the long run, seniors are looking forward to specialized indulgent food and drinks which balance nutrition and taste well. Claims associated with dysfunction and ease ...

Packaged Bakery Foods - China

"The packaged bakery foods category is expected to maintain steady growth in coming years. Driven by the continuous pursuit of healthiness, precision packaged bakery products targeting different demographic segments have the potential to grow, especially older generations, following the rise of the 'silver economy'. In addition, as traditional pastries keep ...

零食消费趋势 - China

“后疫情时代，零食市场预计将继续保持增长势头，消费者的习惯性零食消费以及对健康和优质产品的追求将在很大程度上推动市场增长。鉴于市场细分程度日益加深，而且消费者对健康零食的看法不一，建议品牌通过免费试吃的方式推广创新口味，并利用定制化产品瞄准不同的消费者细分群体，同时不在零食的纵享属性方面做过多妥协。”

— 殷如君，高级研究分析师

March 2022

节庆食品 - China

“因新冠疫情而实施的交通管制措施一方面削减家庭聚会的频率，另一方面则推进自我时光的蓬勃增长。这带动了消费者在西方节日期间的开支，尤其是气氛欢乐的圣诞节和万圣节，同时出于对自身的关注，消费者对有益健康的传统节庆食品的需求也不断上涨。由于消费者在春节的聚会受到限制，他们在中秋节等长假的食品饮料开支蕴藏增长潜力。”

— 黄梦菲，研究分析师

为儿童购买食品饮料的态度 - China

“首份儿童零食标准的发布为儿童食品饮料产品树立了标杆，再加上近来的教育改革旨在促进儿童的整体身心健康，因此，儿童食品饮料市场日益受到资本和企业的重视。如今的家长见多识广且越来越重视健康，面对他们挑剔的目光，品牌的增长机会在于针对儿童日益严重的健康问题推出革新产品，减轻家长对此的担忧，并推出面向不同年龄段儿童的新品，为孩子提供专属关爱。”

— 张辰钰，高级研究分析师

February 2022

Festive Foods - China

“Due to COVID-19, traffic restrictions undermine family reunions and unveil booming me-time scenarios, resulting in increasing spending on Western festivals especially Christmas and Halloween featured with hedonic atmosphere and demand on better-for-you traditional festivals foods. Meanwhile, other long holiday festivals, namely the Moon Festival has seen opportunities in growing consumer ...

Purchasing Food and Drink for Children - China

“The release of the first children snack standard has set the standard bar high for children food and drink products, coupled with recent education reformation towards promoting children’s holistic wellbeing, this market is being increasingly valued by capitals and enterprises. Facing scrutiny by ever knowledgeable and health driven parents, opportunities ...